REVIEW AND VALIDATE QUOTATIONS

MFG

Purpose

The purpose of this Quick Reference Guide (**QRG**) is to provide a step-by-step guide of how to ***review and validate quotations*** in the North Carolina Financial System (**NCFS**).

Introduction and Overview

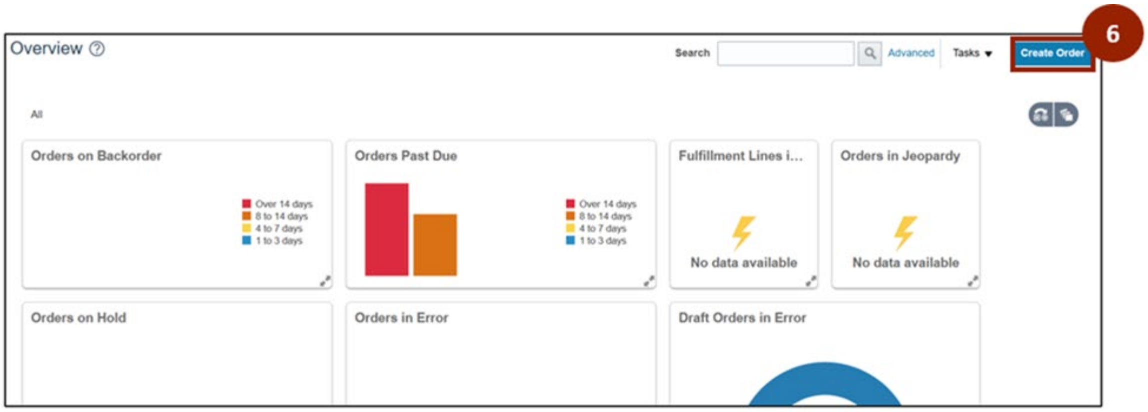
This QRG covers the process for reviewing and validating quotations in NCFS.

Review and Validate Quotations

1. Click the **Company Single Sign-On (SSO)** button.
2. Enter your **dac.nc.gov** email address.
3. Click **Next**, then enter **password.**
4. On the ***Home*** page, select the **Order Management** tab.
5. Click **Order Management App.**

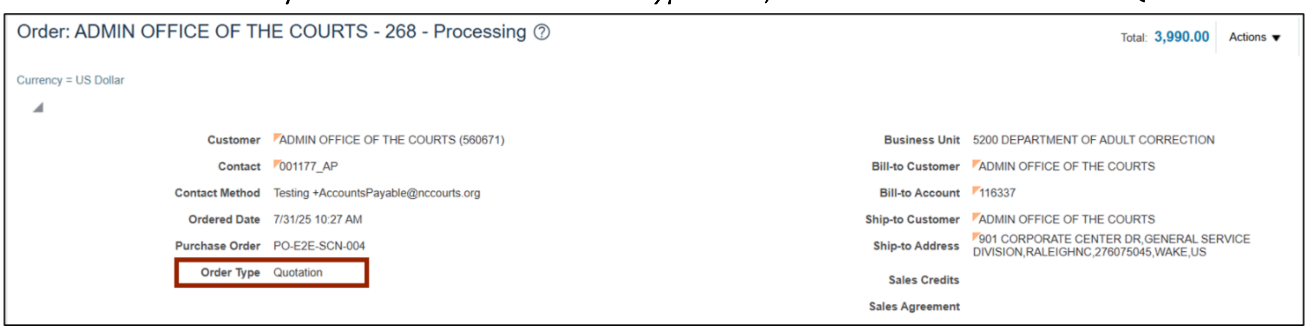
Note: The ***Order Management Overview*** screen displays information visually, providing data for DAC. As orders are created and progress, the diagrams and values will populate on this screen. If it is a new instance, this screen displays with minimal information.

6. Click the **Create Order** button.



Note: To create a quotation, follow the steps outlined in the MFG-29 Entering Manual Orders QRG. Be sure to set the *Order Type* filed to **Quotation**. Once the quotation has been created, continue with the steps below to review and validate the quotation details.

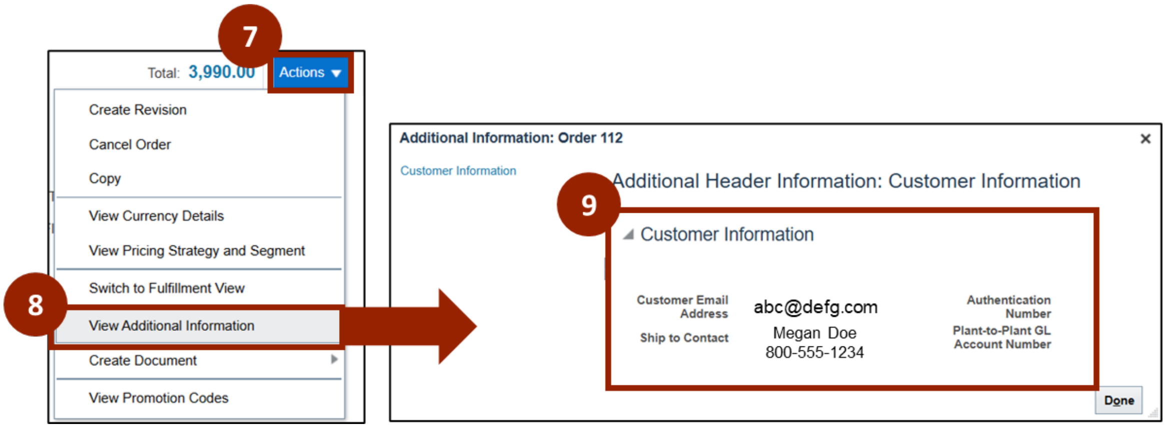
Once you are on the ***Create Order*** screen, the process for creating a quotation follows the same consistent approach used for other order types. The screen layout, header fields, and tabs remain the same. The Primary distinction is in the *Order Type* field, which in this case is set to **Quotation**.



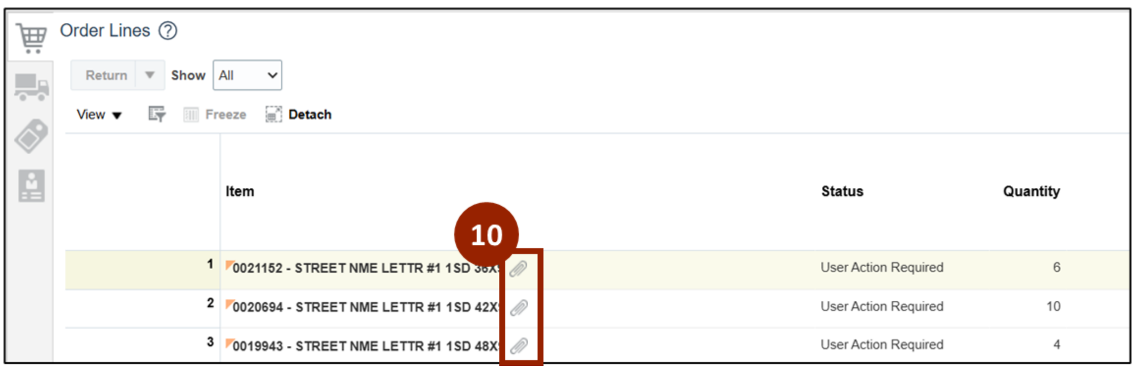
After submission, validate details from the *Additional Information* fields and the **Order Lines** tab attachments.

7. From the ***Order*** screen, click the **Actions** drop-down.
8. Select **View Additional Information.**

9. Review the displayed information in the *Additional Information* fields.



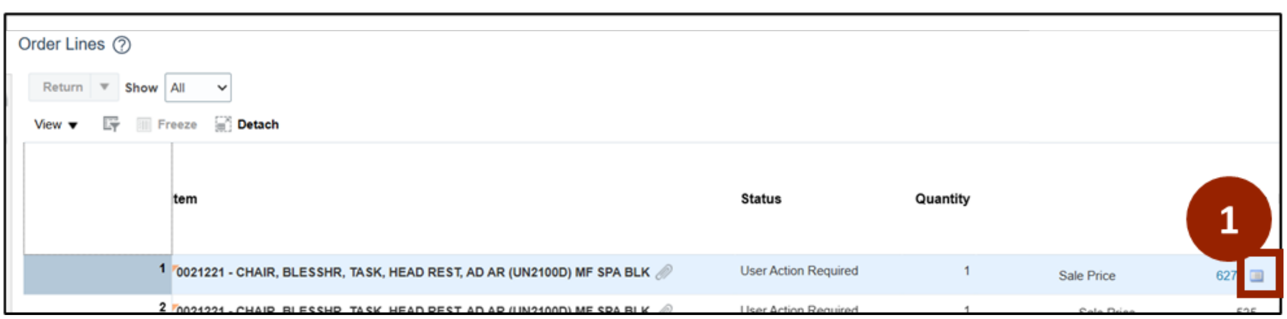
10. Navigate to the **Order Lines** tab to validate attachments.



Price Adjustment: Your Price

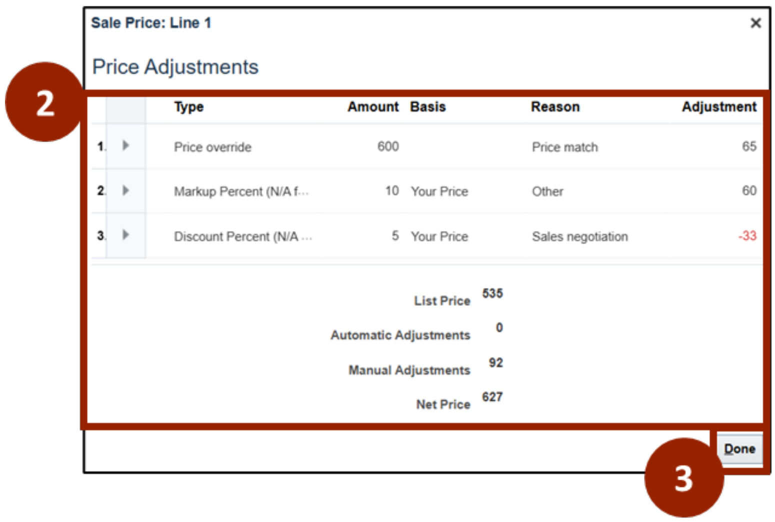
To validate the price adjustment of the order line using the *Your Price* column, follow these steps:

1. Click the **Your Price** icon.



2. In the ***Sale Price*** window, verify the **displayed information.**
3. Click **Done.**

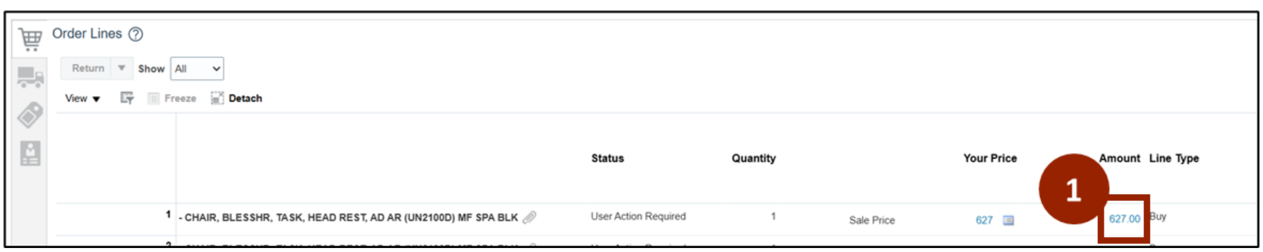
Note: If the **Your Price** icon is not visible, no price adjustments have been done on the line.



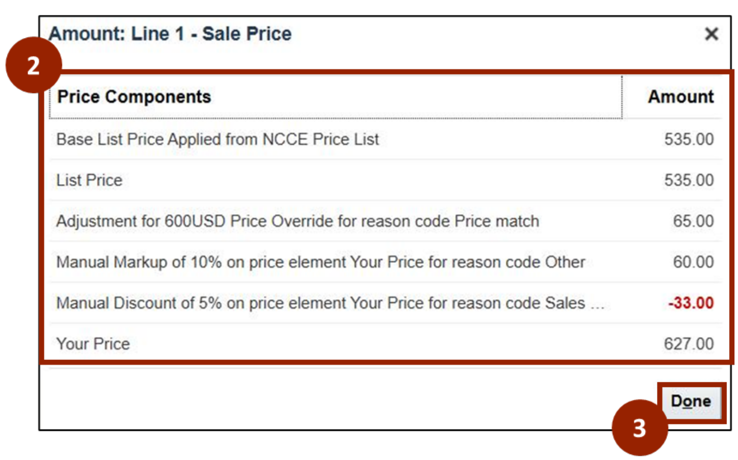
Price Adjustment: Amount

To validate the price adjustment of the **Order Line** using the *Amount* column, follow these steps:

1. Click the **Amount column** link.



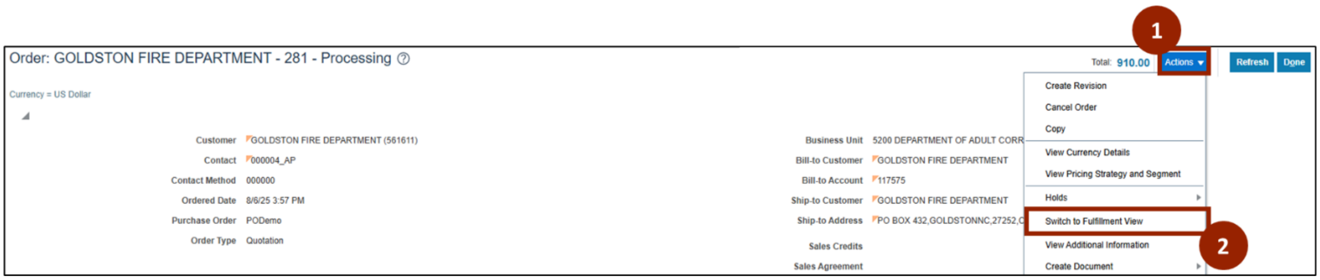
2. In the ***Amount*** window, verify the **displayed information.**
3. Click **Done**



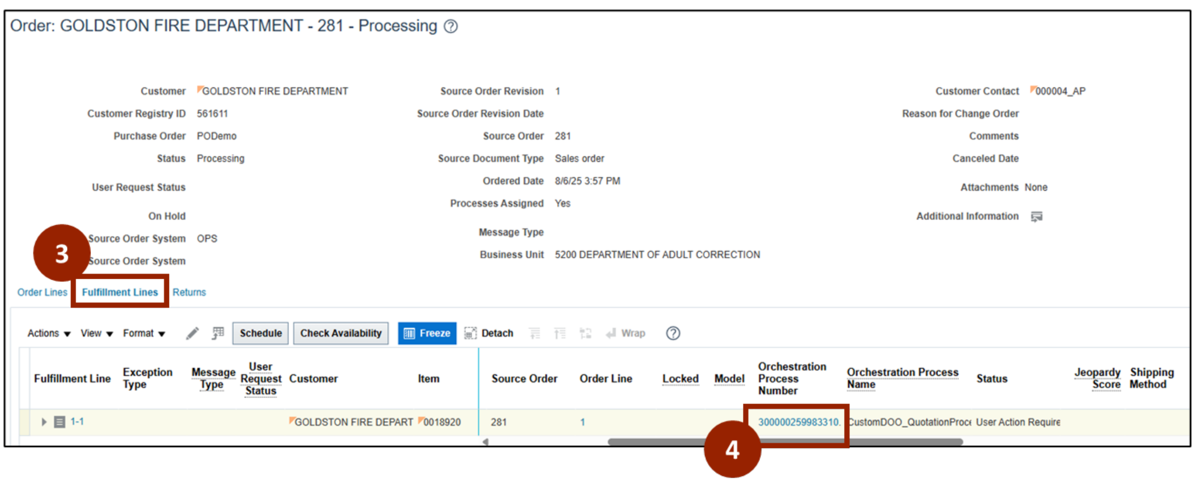
Manually Release a Pause

When a quotation is created, the sales order line status is set to **User Action Required**. The quotation in NCFS remains open for 180 days will automatically close after 180 days. To manually close a quotation within 180 days a pause needs to be completed. To manually release a pause, follow these steps:

1. Click the **Actions** drop-down.
2. Click **Switch to Fulfillment View.**

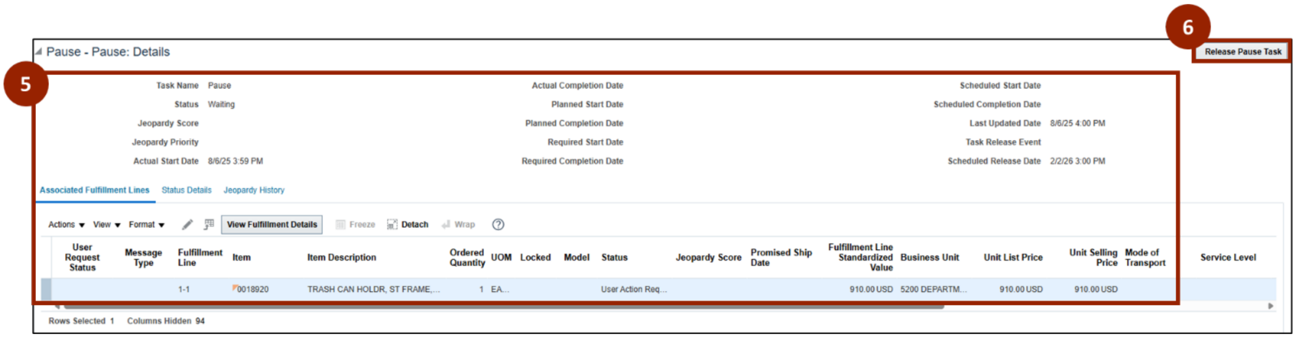


3. Click the **Fulfillment Lines** tab.
4. Click the **Orchestration Process Number** link for the desired order line to be released.

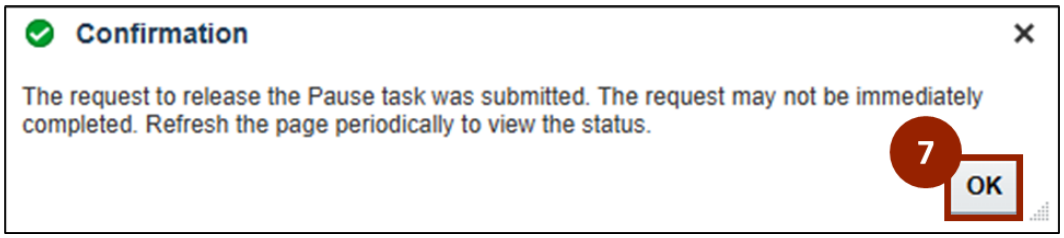


Note: A quotation order type will have two tasks under the **Orchestration Plan** tab.

5. Scroll down to the *Pause – Pause: Details* section to **view additional details.**
6. Click the **Release Pause Task** button to release the pause.



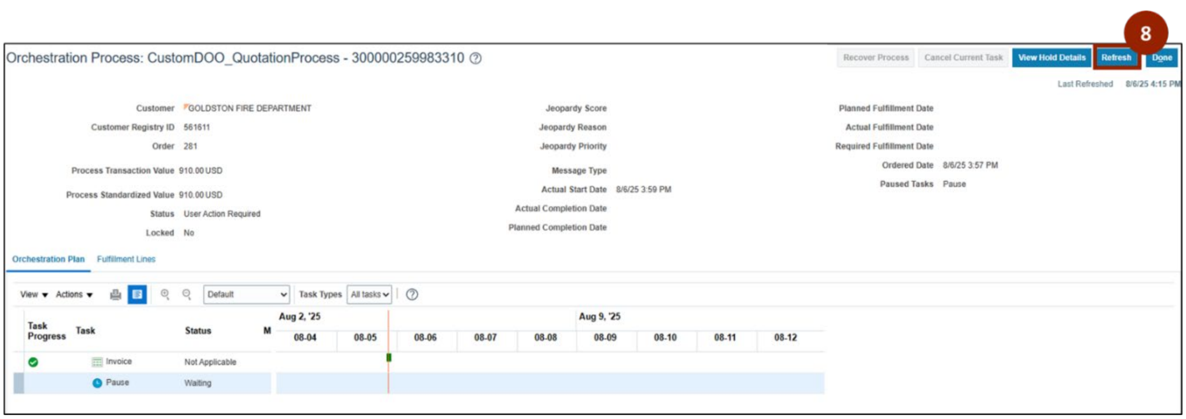
7. A ***Confirmation*** screen displays confirming that the request was submitted, click **OK** to close.



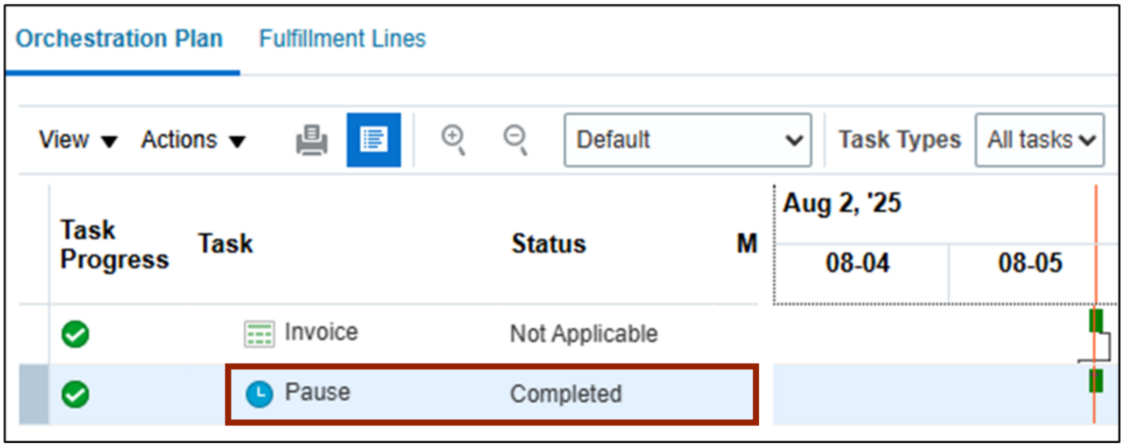
The **Orchestration Plan** tab's *Status* column displays the status of the pause.

8. Click the **Refresh** button to monitor the status of the pause.

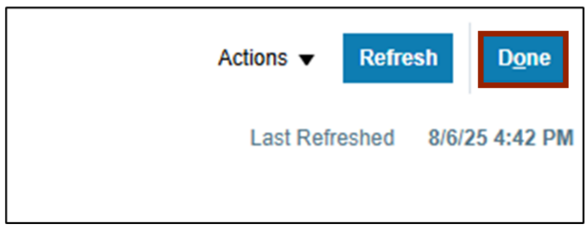
Note: The system automatically releases the pause and closes the order after 180 days.



Note: Once the pause task has been completed, the **Orchestration Plan** tab's *Status* column displays the status of the pause as **Completed**.



Note: Once complete, Click the **Done** button until you return to the ***Create Order*** screen.



Wrap-Up

NCFS users can ***review and validate quotations*** *orders* by following the steps outlined above.

Additional Resources

Instructor Led Training (ILT)

- MFG114 – Manages Sales Order 2